(ഡി) ഡോക്ടറെ എന്നത്തേക്ക് നിയമിക്കാൻ കഴിയും എന്ന് വ്യക്തമാക്കാമോ?

ഉത്തരം

(എ), (ബി), (സി) ആന്റ് (ഡി) ഡോക്ടറെ നിയമിക്കാനും, പോളിക്ലിനിക്കിനെ സംബന്ധിച്ചുള്ള പരാതികൾ പരിഹരിക്കാനും നടപടി എടുത്തുവരുന്നു.

പെരുമണ്ണ പഞ്ചായത്തിൽ മൃഗാശുപത്രി

123 [2092] ശ്രീ. യു. സി. രാമൻ: താഴെ കാണുന്ന ചോദ്യങ്ങൾക്ക് കൃഷിയും കയറും വകുപ്പുമന്ത്രി സദയം മറുപടി നൽകുമോ:

(എ) കുന്ദമംഗലം മണ്ഡലത്തിലെ പെരുമണ്ണ പഞ്ചായത്തിൽ ഒരു മൃഗാശുപത്രി ഇല്ല എന്ന കാര്യം സർക്കാരിന്റെ ശ്രദ്ധയിൽപ്പെട്ടിട്ടുണ്ടോ;

(ബി) ഇവിടെ മൃഗാശുപത്രി അനുവദിക്കാൻ സർക്കാർ ഉദ്ദേശിക്കുന്നുണ്ടോ;

(സി) എങ്കിൽ ഇതിന്റെ പ്രവർത്തനം എന്നു മുതൽ ആരംഭിക്കാൻ കഴിയുമെന്ന് വ്യക്തമാക്കാമോ?

ഉത്തരം

(എ) ഉണ്ട്.

(ബി) ആന്റ് (സി) ഇപ്പോൾ പരിഗണനയിലില്ല. എന്നിരുന്നാലും 2004-2005 സാമ്പത്തിക വർഷത്തേക്ക് 3928.75 ലക്ഷം രൂപ പദ്ധതിക്കായി വകയിരുത്തിയിട്ടുണ്ട്. ടി തുകയിൽനിന്ന് 1509.5 ലക്ഷം രൂപ 2403-00-101-97 മൃഗാശുപത്രികളുടെ വികസനവും പുനഃസംഘടനയും, മൃഗചികിൽസാ സേവനങ്ങൾ ശക്തിപ്പെടുത്തൽ എന്ന ശീർഷകത്തിൽ വിഹിതമായി വകയിരുത്തിയിട്ടുണ്ട്. ഈ ശീർഷകത്തിൽ നിന്ന് മൃഗാശുപത്രികൾ പുതുതായി പണികഴിപ്പിക്കുന്നതിന് ഗ്രാമ പഞ്ചായത്തുകൾക്ക് 2.5 ലക്ഷം രൂപാ വീതം സഹായ ധനം 50:50 എന്ന അനുപാതത്തിൽ 32 പഞ്ചായത്തുകൾക്ക് ഈ സാമ്പത്തിക വർഷം നൽകുവാൻ തീരുമാനിച്ചിട്ടുണ്ട്.

കയർ സഹകരണ സംഘങ്ങളും ഉൽപ്പാദന യൂണിറ്റുകളും

124 [2093] ശ്രീ. കോവൂർ കുഞ്ഞുമോൻ: താഴെ കാണുന്ന ചോദ്യങ്ങൾക്ക് കൃഷിയും കയറും വകുപ്പുമന്ത്രി സദയം മറുപടി നൽകുമോ:

(എ) സംസ്ഥാനത്ത് ഇപ്പോൾ എത്ര കയർ സഹകരണ സംഘങ്ങളും കയർ ഉൽപ്പാദന യൂണിറ്റുകളും പ്രവർത്തിക്കുന്നു എന്ന് ജില്ലതിരിച്ച് വെളിപ്പെടുത്തുമോ;

(ബി) ഈ സർക്കാർ വന്നതിനുശേഷം കയർമേഖലയിലെ തൊഴിലാളികൾക്ക് പ്രതിവർഷം എത്ര തൊഴിൽദിനങ്ങൾ ലഭിച്ചു;

(സി) കയർ ഉൽപ്പാദന യൂണിറ്റുകൾക്ക് ഈ സർക്കാരിന്റെ കാലയളവിൽ എത്ര രൂപ പ്രതിവർഷം ധനസഹായം നൽകി;

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(ഡി) സംസ്ഥാനത്തും സംസ്ഥാനത്തിനു പുറത്തും വിദേശത്തും പ്രതിവർഷം വിറ്റഴിയുന്നത് എത്ര രൂപയുടെ കയർ ആണെന്ന് തരംതിരിച്ച് വെളിപ്പെടുത്തുമോ;

(ഇ) കയർമേഖല നേരിടുന്ന പ്രശ്നങ്ങളെ സംബന്ധിച്ച് പഠനം നടത്തിയിട്ടുണ്ടോ; എങ്കിൽ റിപ്പോർട്ടിന്റെ പകർപ്പ് നൽകാമോ;

(എഫ്) പ്രസ്തുത പ്രശ്നങ്ങൾ പരിഹരിക്കാൻ എന്തു നടപടി സ്വീകരിക്കും എന്ന് വെളിപ്പെടുത്തുമോ?

ഉത്തരം

(എ) സംസ്ഥാനത്ത് ഇപ്പോൾ പ്രവർത്തിക്കുന്ന കയർ സഹകരണ സംഘങ്ങളുടെ ജില്ല തിരിച്ചുള്ള വിവരം താഴെ കൊടുത്തിരിക്കുന്നു:

തിരുവനന്തപുരം	..	42
കൊല്ലം	..	81
ആലപ്പുഴ	..	166
കോട്ടയം	..	27
എറണാകുളം	..	13
തൃശ്ശൂർ	..	15
മലപ്പുറം	..	20
കോഴിക്കോട്	..	60
കണ്ണൂർ	..	40
ആകെ	..	464

(ബി) പ്രതിവർഷം ശരാശരി 160 ദിവസം തൊഴിൽ ലഭിച്ചിട്ടുണ്ട്.

(സി) ഈ സർക്കാർ വന്നതിനുശേഷം കയർഫെഡ്, പൊതുമേഖലാ സ്ഥാപനങ്ങളായ കേരളാ സ്റ്റേറ്റ് കയർ കോർപ്പറേഷൻ, ഫോം മാറ്റിംഗ്സ് ഇൻഡ്യ എന്നിവയ്ക്കും സഹകരണ മേഖലയിലെ മറ്റ് കയർ ഉൽപ്പാദനയൂണിറ്റുകൾക്കുമായി എം. ഡി. എ. പുനരുദ്ധാരണ ഫണ്ട്, മാർജിൻ മണി, വർക്കിംഗ് ക്യാപ്പിറ്റൽ, ഗോഡൗൺ, പ്രോസസിംഗ്, സ്പെഷ്യൽ ഡിസ്ക്കൗണ്ട് തുടങ്ങിയ ഇനങ്ങളിലായി ധനസഹായം താഴെപ്പറയുന്ന ക്രമത്തിൽ നൽകിയിട്ടുണ്ട്:

വർഷം	*തുക*
2001-2002	1930.7 ലക്ഷം
2002-2003	317.79 ,,
2003-2004	484.98 ,,

(ഡി) സംസ്ഥാനത്തും, സംസ്ഥാനത്തിനുപുറത്തും വിറ്റഴിയുന്ന കയറിന്റെ വിവരം പ്രത്യേകം ശേഖരിക്കുന്നില്ല. വിദേശത്തേയ്ക്കുള്ള കയറ്റുമതി താഴെ പറയും പ്രകാരമാണ്.

2000-2001-ൽ	130045.51	ലക്ഷം രൂപ
2001-2002-ൽ	30113.16	,,
2002-2003-ൽ	32658.79	,,

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(ഇ) ഉണ്ട്. ശുപാർശകളുടെ പകർപ്പ് ഇതോടൊപ്പം വയ്ക്കുന്നു. †

(എഫ്) പഠനറിപ്പോർട്ടിലെ നിർദ്ദേശങ്ങളുടെ അടിസ്ഥാനത്തിൽ ചില പുതിയ പദ്ധതികൾക്ക് 2004—2005-ലെ ബഡ്ജറ്റിൽ തുക ഉൾപ്പെടുത്തിയിട്ടുണ്ട്. മറ്റ് നിർദ്ദേശങ്ങൾ പരിശോധിച്ചുവരുന്നു.

കയർ മേഖലയിൽ കേന്ദ്രസർക്കാർ ധനസഹായത്തോടെയുള്ള പദ്ധതികൾ

125 [2094] ഡോ. തോമസ് ഐസക്: താഴെ കാണുന്ന ചോദ്യങ്ങൾക്ക് കൃഷിയും കയറും വകുപ്പുമന്ത്രി സദയം മറുപടി നൽകുമോ:

(എ) കയർ മേഖലയിൽ 2001—2002 മുതൽ 2003—2004 വരെ കേന്ദ്ര സർക്കാർ ധനസഹായത്തോടെ നടപ്പിലാക്കുവാൻ ബഡ്ജറ്റിൽ ഉൾപ്പെടുത്തിയിരുന്ന പദ്ധതികൾ ഏതെല്ലാമാണെന്നും ഓരോ പദ്ധതിയുടെ ആകെ അടങ്കൽ, കേന്ദ്ര വിഹിതം എത്രയായിരുന്നുവെന്നും വ്യക്തമാക്കുമോ;

(ബി) മേൽപ്പറഞ്ഞ കാലയളവിൽ നടപ്പിലാക്കിയ പദ്ധതികൾ ഏതെല്ലാമാണെന്നും ഓരോ പദ്ധതിക്കും ആകെ ചെലവഴിച്ച തുക, കേന്ദ്രസർക്കാർ അനുവദിച്ച തുക, ഇതിൽനിന്നുണ്ടായ നേട്ടങ്ങൾ എന്നിവയും വിശദമാക്കാമോ;

(സി) ബഡ്ജറ്റിൽ ഉൾപ്പെടുത്തിയ പദ്ധതികൾ നടപ്പിലാക്കാൻ കഴിഞ്ഞിട്ടില്ലെങ്കിൽ അതിനുള്ള കാരണങ്ങൾ എന്തെല്ലാമാണ്;

(ഡി) പുതിയ കേന്ദ്രസർക്കാരിൽ കയർ വ്യവസായ വികസനത്തിന് എന്തെല്ലാം പദ്ധതികൾ സംസ്ഥാന സർക്കാർ സമർപ്പിച്ചിട്ടുണ്ടെന്ന് വെളിപ്പെടുത്താമോ;

(ഇ) നിലവിലുള്ള കേന്ദ്രസർക്കാർ സ്കീമുകളിൽ എന്തെങ്കിലും മാറ്റം വരുത്തുവാൻ സംസ്ഥാന സർക്കാർ ആവശ്യപ്പെട്ടിട്ടുണ്ടോ; എങ്കിൽ വിശദാംശങ്ങൾ നൽകാമോ?

ഉത്തരം

(എ—സി) അനുബന്ധമായി ചേർത്തിട്ടുണ്ട്. ††

(ഡി) കയർ സഹകരണ മേഖലയുടെ പുനരുദ്ധാരണത്തിനായി 25 കോടി രൂപ ഗ്രാന്റ് അനുവദിക്കുന്നതിനും എം. ഇ. പി., പി. പി. ഇ. എസ്. പദ്ധതികൾ എന്നിവ വീണ്ടും നടപ്പിലാക്കുന്നതിനും എം. ഡി. എ.-ക്കുള്ള കേന്ദ്ര വിഹിതം വർദ്ധിപ്പിക്കുവാനും ഒരു നാഷണൽ കയർ ഗവേഷണ കേന്ദ്രം സ്ഥാപിക്കുന്നതിനും കയർ ക്ഷേമനിധി ബോർഡിന് ഗ്രാന്റ് അനുവദിക്കുന്നതിനുമാണ് കേന്ദ്ര ഗവൺമെന്റിനോട് ആവശ്യപ്പെട്ടിട്ടുള്ളത്.

(ഇ) ഇല്ല.

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† അനുബന്ധം XVI

†† ലൈബ്രറിയിൽ വച്ചിട്ടുണ്ട്.

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അനുബന്ധം XV (എ)

[നക്ഷത്ര ചിഹ്നമിടാത്ത ചോദ്യത്തിന്റെ ഉത്തരം 117 (2086) കാണുക.]

കേരള കാർഷിക സർവ്വകലാശാലയിൽ നിലവിലുള്ള ടീച്ചിംഗ് സ്റ്റാഫ്

(1-1-2004 വരെ)

ഫാക്കൽറ്റി	പ്രൊഫസർ	അസോസിയേറ്റ് പ്രൊഫസർ	അസിസ്റ്റന്റ് പ്രൊഫസർ	ആകെ
(1)	(2)	(3)	(4)	(5)
അഗ്രിക്കൾച്ചർ . .	26	229	224	479
വെറ്ററിനറി . .	6	57	67	130
അഗ്രിക്കൾച്ചറൽ എഞ്ചിനീയറിംഗ് . .	3	8	39	50
ഫിഷറീസ് . .	0	25	13	38
ആകെ	35	319	343	697

അനുബന്ധം XVI

[നക്ഷത്രചിഹ്നമിടാത്ത ചോദ്യത്തിന്റെ ഉത്തരം 124 (2093) കാണുക]

Chapter 8

Recommendations

In this chapter we present our recommendations on the Terms of Reference of the study as below:

To Identify the major problems faced by the coir industry in Kerala.

There are many problems confronting the coir industry in Kerala at the current juncture. Three major problems relating to raw material availability, marketing and mechanization are pointed out here.

A major problem in the industry relates to raw material availability. Raw material principally consists of husk and fibre. It is the major requirement for expansion and growth of the industry.

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Although official statistics indicate that husk utilization is to the tune of 40%, it was revealed during the course of this study that in reality it is not more than 30%, although Kerala is the largest producer of coconuts in the country. In fact low husk utilization has led to scarcity of fibre in the State which is a major problem in the industry in Kerala. There are many reasons for low husk utilization and scarcity of fibre in the State, namely, disease affecting the coconut trees which has affected productivity, fragmented coconut cultivation, plucking of tender coconuts, lack of systems of husk collection etc. Low husk utilization is also linked with the manual process of fibre extraction in the State. There are very few defibreing units in Kerala and most of the units are not working due to inadequate power supply or due to mechanical problems. Fibre scarcity has led to high price of fibre and low availability in the State. Most of the fibre being used in Kerala is being brought from Tamil Nadu.

The Problem of availability of raw material is a crucial issue threatening the very survival of the industry in Kerala. It is obvious that a solution needs to be worked out at this juncture. At the initial stage there should be systems set up for husk collection. Panchayats can be made responsible for husk collection. Currently a large share of the husks are being used as cheap fuel this should be curtailed by building up social awareness on this issue and also devising systems for husk collection. Secondly, an alternative to the traditional retting process needs to be found. This can be done by setting up of defibreing units in each Panchayat with the involvement of the Ministry of Rural Development. Mobile defibreing units can also be popularized. Thirdly, since the husk available in Kerala has been affected by disease, the possibility of importing fibre from other countries such as Sri Lanka through an Advance License may be considered. The fibre from Sri Lanka is good quality white fibre and is preferable to the brown fibre currently being purchased from Tamil Nadu.

Marketing

The marketing issue is related to the industry structure in Kerala. The coir industry in Kerala is a mix of household based production and factory based production. The producers include individuals, small, medium and large scale private manufactures, co-operative societies, state based coir organizations and the Coir Board. Marketing conflicts arise because of the differing wage and price structures followed in the different segments. Further there are vast differences between the domestic and export markets. Some of these issues are specified as below:

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Domestic Market

The major players on the domestic market are the public sector organizations and a large number of small traders and agents. The public sector organizations themselves sell to large agents and wholesalers as there are no established outlets for coir products. The coir industry does not have major players who are interested in the development of the domestic market. There is need to develop the demestic market in terms of standardization of quality, market development through awareness and brand building. In an era where all commodities in the demestic market are developing brand identities and improving margins, lack of branding and positioning for coir will be highly disadvantageious for the industry. Another issue is packaging. There is no concept of packaging in the coir industry. If the industry is to gain competitive advantage compared to cheaper substitutes in the synthetic sector, it must gear up on these aspects.

International Market

On the international market a major problem of the coir industry is its heavy dependence on mats and mattings as its major products. The competition is severe both because of cheap availability of products as well as availability of cheap quality products. In Korea for instance which has a good market for geo-textiles, supply is from the single ply lower quality geo-textiles from Vietnam at much lower prices. Although India is the largest producer of coir products, the countries that are now competing with us are already into aggressive marketing of new and diversified products.

Further while production in India is still in the small and medium scale, Sri Lanka, Vietnam and China are in the mass production mode and will be in a position to supply the quantities required in the world market. The only competitive advantage in this sector would be tapping the needs of the big buyers with a production base large enough to meet the order sizes required in the international markets. The inability of the Indian industry to make globol quantities available speedily has been detrimental to the successful exploitation and growth in the global markets and this is true of the coir sector as well.

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Key issues in Competitiveness of the Coir Industry.

The key capabilities that must be developed for the global and domestic competitiveness of the coir industry are presented below:

A. Strategy Formulation:

As opposed to the universal handling of all coir products for development, export and marketing, as is happening now, specialisations need to be built in terms of broad product categories. These have to be application and market based. Such categorization would require specific strategies for development and promotion. For example, for the geo-textiles sector, creation of industrial level production units and market promotion aimed at industrial application awareness building would be necessary. For the non-apparel home and office furnishings, market research, identification and development of new and value markets would be essential. In mattings, helping the industry move towards blends with support in innovative designs will be the primary strategies.

B. Standardisation and Quality:

While the Coirmark has been an effort in the right direction, the need to rationalize the product range in standards and the nomenclature of the standards is absolutely essential. The standards prescribed are too many and relate only to the fibres of Kerala origin. These have to be universalized and variety reduction attempted for manageable development. Specifically, there should be bench marking of quality and mandatory testing for some products namely those which are higher up in the value chain but not for all products especially, the products of 'mass consumption'. Quality in terms of real quality has to be ensured for the protection and development of the export and domestic markets. Quality in perceived terms has to be enhanced in the eyes of the customer through brand building and awareness creation, thus increasing the demand for the product. Coir products do not have a brand perspective and personality.

C. Publicity and Promotion:

This is a significant area of concern, as in the past, this has, at best been erratic. There has to be a detailed strategy worked out in this regard that ensures sustained development of awareness and brand building on a concerted basis. There has to be close and integrated working of the Government and industry in this regard.

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Research:

Research is another area that needs to be strengthened in the coir industry. This includes research both in the technology for productivity enhancement, product development as well as market research. Systematic studies do not exist for market information, analysis and dissemination. This erodes the competitive capability of the industry, initially for the smaller players, but for the bigger players also in the long run. For specific products, eg. geo-textiles where a great deal of technical research has been undertaken, there is need for dissemination of information to industry. This also has to be backed up by market information and analysis to facilitate competitiveness of the product and continuous quality improvement. The new R & D Institute that is being proposed (NICRMI) needs to be involved equally in dissemination of reseach results in tune with developments on international markets.

The status of mechanization in Kerala

The status of mechanization was examined in this study for the three major sectors of the coir industry in Kerala namely, the fibre, yarn and product sectors. Traditional methods of production, mostly unskilled are still prevailing in the industry, except in the weaving sector. The major reasons for this can be traced to the fear of labour displacement and unemployment. In Kerala, efforts at mechanization have met with stiff resistance from the Unions. As a direct fall out of this the coir industry started developing in the neighbouring States of Tamil Nadu and Karnataka. Currently, the coir industry in Kerala is highly dependent on fibre from Tamil Nadu which is produced entirely through mechanized processes.

Kerala produces white fibre. Retting is a totally traditional operation in Kerala and requires experienced labour. It is a difficult process and also involves related problems such as pollution and other environmental problems. An alternative method for extracting fibre from husk has to be found out. The retting process takes six months.

A bacterial cocktail called coirret was developed by Coir Board for upgrading the quality of green husk fibre. There has been an attempt to popularize the use of coirret for improving the quality of fibre. However,

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coirret is of a temperature sensitive nature. It remains potent during storage periods within a temperature range of 4-25 degrees centigrade, a parameter difficult to obtain without refrigeration. The end user residing in the village has either bare minimum or no power supply and hence the coirret on a large scale has proved difficult.

In the yarn sector in Kerala spinning is mostly done by hand spinning on the 'Charkha' or spinning wheel. A small proportion is spun with motorized ratts. The introduction of motorized ratts in Kerala was not a success. It had problems related to design and was not found to be useful. The industry requires a versatile spinning machine. Although tbere is research going on in this area an appropriate spinning machine which is acceptable to all sections of trade has not yet been found.

There are problems related to the dyeing process as well and the process requires improvement. Yarn is resistant to dyeing but is easy to bleach. Research is required in this area.

In the product sector, the major categories of products produced in Kerala include mats, mattings, rugs, carpets and rubberized coir. There are different types of mats produced in Kerala such as rod mats, fibre mat, creel mat, bit mat, etc. Coir mats are made on wooden handlooms similar to textile handlooms which are made locally with wood and are based on age old traditional designs. Mat weaving is also a cottage industry concentrated in the Alleppey District of Kerala. Primary weavers produce semi finished mats which are delivered to larger units and also to exporters. Mat production is also undertaken in the co-operative sector. Production is organized in sheds near the weavers house. The number of looms per unit may range from one to four. The finishing processes which are normally undertaken by the exporter include sizing, binding, trimming, shearing, clipping, stenciling, dipping, smoking etc.

Coir mattings are made on traditional handlooms and also on semi automatic and fully automatic powerlooms. Powerlooms are used in a few units for the production of mattings. The productivity on these machines are higher and the quality is also more uniform and of a superior category.

Suggested alternatives for Mechanisation:

Kerala's coir industry is facing a serious threat on world markets as well as on the domestic market. One of the major issues which arise in this context is that of mechanization.

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As far as the fibre sector is concerned, mechanized defibreing is imperative in Kerala if the industry is to survive. There are two types of processes which are typically used for mechanical extraction of fibre from husk. These are defibreing and decortication.

In the former process, nuts are broken manually and taken by conveyors for crushing the crusher crushes the husks. Thereafter they are soaked in water for around ten days with periodic water spraying. The soaked husks are taken to the defibreing machine for extraction of fibre, put in the combing machine and later put through the turbo cleaner. The cleaned fibre is dried in the sunlight, the dried fibre is sold or further processed.

In the decortication process, the buster or disintegrator machine breaks the husks and puts them through a decorticator. They are thereafter screened through a screener and then baled in a baling press.

The possibility of having mobile defibreing units which can be moved from site to site can be considered in the context of Kerala given the scattered nature of coconut cultivation. This is important because if the husks have to be transported to the site for defibreing, then the transport costs may prove prohibitive. Mechanical defireing will reduce the costs of labour significantly because productivity will improve manifold. The issue of mechanized defibreing has been extremely controversial in Kerala because of its potential implications for employment. However at present, fibre is hardly being produced in Kerala. Most of the fibre is being purchased from Tamil Nadu. The labour force engaged in the retting process has been considerable reduced.

Further, the drudgery and the health hazard involved in the manual retting process is well understood by the labour force. In this situation, to introduce mechanized defibreing would only prove beneficial to the coir industry in Kerala since it will improve productivity, reduce costs and also reduce the dependence on purchase of fibre from Tamil Nadu. The type of defibreing units required needs to be worked out and appropriate R & D needs to be carried out in this area. There is also need to examine the suitability of using the machines producedin Tamil Nadu.

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In the yarn sector a major issue is the failure to maintain an uniform thickness and twist in a length of yarn. There has been an increase in the demand for machine spun yarn particularly on international markets. Accordingly the main emphasis of research in the spinning sector has been towards developing a versatile spinning machine. The Central Coir Research Institute (CCRI) has been involved in research in this area.

There have been several steps taken in improving the spinning process, for example through the introduction of the motorized traditional ratt. The Coir Board developed a technology for motorisation of the traditional ratts under which a ¼ HP motor is attached to a stationary ratt. By this process the rotator of the stationary ratt could be eliminated. The motorized traditional ratt has been introduced and is being used and it has been found that the quality of yarn spun is superior to that in the traditional ratt, the productivity of the women workers has increased by almost 50% and also the wages of the women workers has been enhanced by 50%. A fully automated versatile spinning machine which is acceptable to all sections of the trade is however yet to be developed.

In the weaving sector as well, there is need to improve the product quality as well as productivity by replacement of traditional looms with improved looms. The option of replacing the traditional looms with semi automatic looms needs to be explored. However this requires to be made a part of a comprehensive scheme including financial incentives and support to the small producers for replacing the outdated traditional looms with semi automatic looms.

To identify the demand oriented coir products out of the different varieties of coir products being produced in the sector and to suggest additional facilities to be provided for development of specific value added products and product diversification in order to access both domestic and external markets.

In this study the demand oriented coir products have been identified (a) in terms of growth rates of exports and (b) by analyzing the movements of unit price of export in the world market and export frends of various coir products in the last six years i.e. between 1997-98 and 2002-2003. On the basis of growth rates of exports, we have identified Tufted Mats, Geo-Textiles and Coir Rope as the demand oriented or high demand coir products. On the basis of patterns of unit price of exports, we found that

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the exports of Coir Rope, Geo-Textiles and Handloom Mat increased in a situation of declining unit price of export (Figures 21 & 22). The correlation co-efficients between export of these products and their unit price of export were found to be negative. This implies that export demand for such products increased in a situation of declining unit price of export. The exports of Tufted Mat and Powerloom Mat also increased although their unit price of export fluctuated during 1997-2003 (Figures 17, 18, 23 & 24).

Thus from our analysis on the basis of (a) growth rate of exports, and (b) movement of unit price and export frends, we conclude that the following products can be classified as high demand products, namely.

- Tufted Mat
- Geo-Textiles
- Handloom Mat
- Powerloom Mat and
- Coir Rope

High Value Added Products:

High value added products are the high priced products or the non traditional products. On the basis of our study we conclude that among coir matting, latex backed matting, coir and sisal matting and among mats, blended products like coir and sisal mats, coir and jute mats, coir and synthetic mix mats, fibre mats, PVC tufted mats etc. are considered to be high value added products.

As far as additional facilities to be provided for development of specific valued added products and product diversification for accessing both domestic and external markets is concerned, there are two major issues which require a thrust, namely marketing and R & D. The major issues in these two aspects are discussed below:

Marketing

Under this head, specific aspects which need to be sepearheaded are: Strategy Formulation, standardization and quality, publicity and promotion and research. These have already been discussed earlier on in this Chapter and in Chapter 2.

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We recommend that in the context of the specific high demand and high value added products that have been identified in this study, the issues of marketing at specific product levels and R & D for these products specifically may be given a thrust. Product specific studies on these two aspects may be carried out in the R & D Institutes. Also, the results of the studies may be disseminated to industry and trade. The R & D Institutes such as C-DOCT and the proposed NICRMI must be involved in this aspect. Technical R & D and market information should proceed side by side in order that international markets may be accessed effectively.

To identify opportunities for private sector Investment in the production of value added products:

Value added products are mostly being produced in the private sector. This is because R & D on specific products and application of such R & D to product development is mostly being undertaken in the private sector as far as the coir industy is concerned. At the current juncture, Government and the private sector should jointly undertake efforts in order to develop the industry. Private sector investment in coir should be encouraged in Kerala and different incentives should be given by the Government in this direction.

In the fibre sector, in addition to Government initiatives private sector can be encouraged to set up defibreing units in order to increase the availability of fibre in the State. For this the necessary incentives should be provided to the private sector such as reform in legislations as regards setting up of fibre units are concerned, providing power connections to defibreing units, etc.

In the yarn sector, the biggest need today is in terms of developing a versatile spinning machine. There should be concerted attempts at involving the private sector in the development of such a machine. The efforts being made to develop the machine should be done jointly with the private sector and there should be a team formed which also represents the private sector. Otherwise machines are being developed which are not acceptable to the private sector. We find that so far the attempts made to develop a versatile spinning machine do not involve the private sector.

In the area of R & D and its application to industry, it is the private sector where most of the work has taken place. Protection in terms of patents or other such rights should be given to individuals or enterprises which develop new products, new designs, etc. This will encourage

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dissemination of information and knowledge on new products and designs that are being developed. R & D in the private sector should be encouraged by taking appropriate measures at the Government level.

To identify the possibilities for developing micro enterprises by women Self Help Groups with Common Facility Centres to support them.

As has been discussed in detail earlier during the course of this study and interviews with small and tiny units in the Alleppey district it is found that clusters have been formed since the past two or three months, with the help of the Panchayats. The raw material is provided by the local Panchayat production takes place at the premises of the producer and is marketed by the Panchayat directly to the exporters. It is understood that there are plans for setting up Common Facility Centres to facilitate the process of cluster development.

The activity under the UNDP project in terms of providing Common Facility Centres to support coir related activities had worked well. This type of activity can be continued and intensified. Ratts can be provided to Women Self Help Group, whcih can be identified and formed with the help of organizations such as the Coir Board and also through the involvement of Panchayats and NGOs. The Common Facility Centers can provide facilities for wet processing to these groups. The required finance for setting up of the Common Facility Centres can be provided jointly by the Coir Board and the State Government in terms of subsidies and/or credit facilities. There should also be facility for training on the ratts and other facilities provided. The Self Help Group should also be facilitated in terms of providing marketing facilities at least at the initial stages.

Study of defibreing, spinning and product manufacturing sectors including:

- Analysis of the present status of the white fibre industry in Kerala
- Raw material availability
- Production Chain
- Role of middle men in the sector
- Marketing Problems
- Machinery related problems
- Logistical problems
- Working of primary co-operatives
- Working of apex societies
- Working of PSUs

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In Chapter 2 of the study we have presented in detail the results of the study of the present status of the white fibre industry in Kerala concentrating on the above heads specified. The study is based on interviews with representatives in the coir industry, analysis of secondary data as well information gathered during studies conducted on the industry in the past by the College.

The structure of the white fibre industry has been discussed in detail with specific reference to the different players in the production chain like producers, workers, exporters, middlemen etc. The problems and priorities confronting each group of players have also been discussed. The issues of raw material availability and the problems in this regard have been discussed in detail. The machinery related problems have been analysed. The working of primary co-operatives and the working of apex societies in the co-operative sector have been discussed and analysed. The working of PSUs has also been studied and discussed in the above-mentioned chapter of this study.

Infrastructure deficiencies of the coir sector with suggestions for dealing with them effectively:

We have discussed in detail earlier in the Report the issue of infrastructure deficiencies in the coir industry in Kerala.

Broadly for the three major sectors of the industry namely fibre, yarn and product, we recommend the installation of defibreing units for mechanical defibreing. There is need to develop and install defibreing units. For this purpose we suggest that collaboration with institutions like the PSG College of Technology may be sought.

In the spinning sector there is need to develop an appropriate spinning machine. Although work has been going on in this area, a versatile spinning machine which would be acceptable to all sections of trade is yet to be developed. There is also need to introduce and spread the use of the motorized tradional ratt and provide training on them. This is a priority area in the industry.

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In the weaving sector, most of the looms being used by households are old traditional and therefore lead to low productivity levels. Sehemes need to be introduced for replacement of these looms.

The processes of dyeing, bleaching and softening of yarn and fibre, broadly covered under the term 'wet processing' are an issue of concern. In the white fibre sector, these processes are carried out by the small scale manufactures under conditions which are not environment friendly. There is need for modernization of these technologies using eco friendly methods.

There is also need to train the manufacturers in these new processes. Common Facility Centres (CFC) with upgraded equipment and Common Effluent Treatment Processes (CETP) providing facilities for wet processing may be set up. The manufacturers also need to be trained in these processes. Dyeing facilities are especially an area of concern.

The issue of development of new products is another area of concern. It has been established for example that coco fibre can be used as a wood substitute, for example as coir ploymer composite boards and for manufacture of quality paper. In order to develop and identify new products which use coco fibre as raw material, there is need to make linkages between research institutions within the coir industry and institutions existing outside the industry such as for instance the National Institute of Design, to enable the process of process of product diversification on a continuous basis.

The C-DOCT has been set up by the Government of Kerala in 1992. Significant reseach at a technical level has been undertaken at this institute in the area of specific products, namely geo-textiles.

There is also a proposal to set up a national Coir Research and Management institute in Kerala. A major objective for setting up this Institute is to promote a holistic development of the coir industry in Kerala through research, including technical research as well as market and policy research, education and management training on all aspects related to coir.

As noted and discussed in detail earlier, R & D is required in the white fibre sector for defibreing, spinning as well in the various activities relating to wet processing. For spinning and defibreing appropriate machines need to be developed. Collaborations can be set up with institutions outside the industry for this purpose.

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For new products in areas such as geo-textiles and wood substitutes, products developed must have international standards for which there is need for continued technical research as well as market information, modernization and quality control.

To enumerate/list the different levels of mechanization involved in different processes in the coir industry in other coir producing states in India based on earlier studies conducted by the College on the coir industry.

In chapter 3 of this study we have discussed in detail the levels of mechanization of different processes in the coir industry in other states. The information is based on earlier studies conducted by the College on the coir industry.

Need for support price system or any other regime for the socio economic development of the sector.

Having been involved in a number of extensive studies on the coir industry and given the current scenario and the decentralized structure of the coir industry in Kerala we recognize that there is a strong welfare aspect in the coir industry which cannot be ignored.

In particular, at this juncture, there should be a benchamark price to protect the interests of the small scale manufactures and the workers and producers in the coir industry in the State. The earlier Purchase Price Enforcement Scheme was not working, for reasons connected with the structure of the industry as well as unrealistic levels of fixation of Purchase Price itself. However if a benchmark price or support price is to be evolved, it must be acceptable to all the stakeholders in the industry, must be realistically fixed, keeping in mind the competitive scenario confronting the coir industry and must be implementable.

Accordingly we recommend that:

- Committees be formed both in the spinning sector as well as in the product sector comprising of all the stakeholders namely exporters, manufacturers, trade unions, dealers, yarn producers etc. to discuss this issue. The process can be facilitated by the Coir Board and by the State Government. It is understood that the Coir Board is already taking an initiative in this direction.

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- Negotiations be undertaken in these committees on an acceptable range for a benchamark price or support price that can be paid. An appropriate, realistic formula needs to be devised which is acceptable to all sections of trade.
- We also recommend that the Coir Board and the State Government monitors and publishes on a quarterly basis, market prices of exports, product wise and market price of raw materials. This will substantially facilitate the producers as well as the exporters.
- An index can be suggested. The base ine price can be the price at the time of taking away of PPES. However we suggest that the market price levels be taken into consideration for fixing the benchmark price.

It may be added here that alongside with fixation of a benchamark/ support price, the small scale manufacturers also require to be provided with raw material and infrastructure and need to be assisted for marketing the products. In this context, cluster development, formation of self help groups and establishment of Common Facility Centres become important. If the small units are to be competitive, these structures need to be evolved and sustained.

Welfare Measures for Coir Workers—Suggestions for improvement

We make the following suggestions for improving welfare measures for coir workers:

- The number of registrations of workers should increase and efforts should be undertaken in this direction.
- Issues such as housing and education should be given priority in the context of welfare measures. Schemes for payment of fees for higher education may be worked out. Schemes for construction and renovation of houses, work sheds etc. may be considered.
- Health, sanitation and hygiene are important issues. For women workers in particular, nursery and creche facilities should be provided. A scheme of health insurance may be worked out by the Board especially for women workers in the coir industry.

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- Schemes which provide financial assistance for training on traditional motorized ratts for women can be worked out. In addition, financial assistance may be provided to women for purchase of ratts.
- The provision for old age pension for coir workers should be increased. It is very meager at present.
- All stakeholders, namely workers, Government, exporters and producers should contribute their shareson a regular basis to the Welfare Fund to ensure that coir workers can benefit from the fund.

അനുബന്ധം XVII

[നക്ഷത്രചിഹ്നമിടാത്ത ചോദ്യത്തിന്റെ ഉത്തരം 126 (2095) കാണുക.]

പച്ചത്തൊണ്ട്, ചകിരി എന്നിവയുടെ കയർ പ്രോജക്ട് ഏരിയ തിരിച്ചുള്ള ശരാശരി വില, നിലവിലുള്ള വില എന്നിവയുടെ സ്റ്റേറ്റ്മെന്റ്

പ്രോജക്ട് ഏരിയ	2001-2002		2002-2003		2003-2004		നിലവിലുള്ള വില	
	പച്ചത്തൊണ്ട് (1000-ന്)	ചകിരി (ക്വിന്റലിന്)	പച്ചത്തൊണ്ട് (1000-ന്)	ചകിരി (ക്വിന്റലിന്)	പച്ചത്തൊണ്ട് (1000-ന്)	ചകിരി (ക്വിന്റലിന്)	പച്ചത്തൊണ്ട് (1000-ന്)	ചകിരി (ക്വിന്റലിന്)
ചിറയിൻകീഴ് . .	560	. . .	615	. .	705	. .	1050	. .
കൊല്ലം . .	650	900	550	1000	700	1100	1050	1550
കായംകുളം . .	464	884	492	1025	510	1327	550	1480
ആലപ്പുഴ . .	380	930	420	1000	425	1055	480	1550
വൈക്കം . .	370	800	400	900	425	1400	425	1400
നോർത്ത് പറവൂർ . .	217	861	285	797	350	1040	400	1210
തൃശൂർ . .	426	1132	358	1005	230	1354	220	1300
പൊന്നാനി . .	220	850	380	915	530	1100	560	1250
കോഴിക്കോട് . .	400	1263	395	1136	490	1300	490	1300
കണ്ണൂർ . .	275	1300	290	1200	300	1250	350	1300

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